

NY3

AARP Tax-Aide News

November 2009, Volume 1, Issue 1

NY3? NY What?

Ever wonder why you had to put NY3 on your expense report? What is a split state? What makes up NY3?

As you all know there are only 50 States in the USA. However, because of the success of the AARP Tax-Aide program, it became necessary to 'split' some states in order to provide more local management support.

New York was 'split' into 4 regions - New York City; Long Island; Northeast; and West.

NY3 comprises the 29 counties in the northeast region (north from Putnam/Orange and east to Oneida/Broome). There are 13 District Coordinators and over 500 volunteers who worked diligently to serve over 21,000 clients in 2008.

Thanks for being a part of

AARP Tax-Aide NY3!!!

**CHECK OUT THE NEW
NY3 WEBSITE**

**FULL OF GREAT
INFORMATION!**

<http://nytaxaide.org/>

Spotlight on Volunteers

Nominated by: Colleen Mooney

Meet Your State Management Team!



FROM L-R: Joe Ciccarino (Training Specialist), Ed Hogarty (State Coordinator), Colleen Mooney (Partnership/Communication Specialist), Howard Riggert (Technology Specialist), Dorothy Ryan (Administration Specialist) (Not Pictured)

Every organization needs structure and leadership to enhance its future and ensure success. The NY3 State Management Team (SMT) consists of the State Coordinator (SC), Administration Specialist (ADS), Partnership/Communication Specialist (PC), Technology Specialist (TCS), Training Specialist (TCS), and Prospective Volunteer Coordinator (PVC), which is currently open. The team works diligently with the AARP Tax-Aide State and National Offices and our local IRS Representatives to be sure the needs and opinions of NY3 members are addressed.

In addition to working with our Tax-Aide and IRS partners, the SMT is responsible for program organization, expansion, and assessment. Monthly meetings are held to discuss new strategies and provide updates on what is being done in each of the specialty areas.

Below are a few facts about your SMT members.

Ed Hogarty State Coordinator

I retired from IBM in 2003 and became a Tax-Aide volunteer in 2005. I served as Counselor, Local Coordinator, ERO, Instructor, and District Coordinator. I particu



**Pete Freiermuth
Trainer Extraordinaire**

I was fortunate enough to have Pete not only as my trainer but also as my first year mentor and ERO. In 2005, I was new to the AARP Tax-Aide program and the only one at my site doing e-files. Pete made home visits to help me set up my computer, stopped by the site to assist me with more complex returns and answered my numerous phone calls to ensure quality returns were completed for each client. Fortunately for me, the site was not very busy that year and the clients were very patient and grateful. It was because of Pete's dedication and assistance that I decided to continue volunteering with the program.

After serving for 5 years as the NY3 TRS, Pete has moved on (and up) and is now supporting all of us in his role as North Atlantic Regional Coordinator.

Congratulations Pete!

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enjoy working with Tax-Aide volunteers and assisting clients with their tax returns. Volunteering provides me with the opportunity to exercise old skills, gain new knowledge, and give back to the community. I currently live in Hopewell Junction with my wife Mary Anne and am very happy to have the ability to work with volunteers and clients in AARP.

**Dorothy Ryan
Administration Specialist**

I have been volunteering for Tax-Aide since the 2002 tax season, when I found out about the organization. I met a Local Coordinator at a National Association of Tax Preparers training session and thought it was a great idea to prepare taxes for people who were unable to pay for preparation. I was a counselor for two tax seasons, 2002 and 2003. During the summer of 2003, when the State Coordinator at the time was looking for a nomination for Administration Specialist (ADS), the Local Coordinator in my district nominated me. Since then, I have been the ADS of my district. In addition to being a counselor and ADS, I am also an instructor. Being a part of the management team has allowed me to see how the program works. I have background knowledge of why things are done the way they are and have been able to add my thoughts to the operation. I have also been able to keep up with the tax laws and changes in technology.

**Colleen Mooney
Partnership/Communication Specialist/ Acting PVC**

As a new resident of Rhinebeck and a daily commuter to NYC, I was interested in getting more involved in something where I could meet new people and provide a service. I noticed the recruitment insert in the AARP Magazine for volunteer tax counselors and since my background was finance and marketing, I thought that I would be a good fit. I served as an AARP Tax-Aide counselor in 2007 and accepted added leadership responsibility of Local Coordinator and ERO in 2008 and 2009 respectively. Additionally, in 2009, I accepted the Partnership/Communications Specialist (PCS) position and had the opportunity to meet and exchange ideas with other PCSs in July at the National Meeting in Dallas, TX. Being part of the AARP Tax-Aide organization provided me an opportunity to learn a new skill and gave me a whole new appreciation for taxpayers with low- to middle income. When asked to become a part of the SMT, I was extremely excited to learn more about how the organization functioned. As a part of the management team working on improving communication with our current volunteers and increasing volunteer recruitment efforts and, in turn, the number of clients we are able to serve.

**Howard Riggert
Technology Specialist**

Prior to AARP, I entered scores of the Professional Engineer Society for seventeen years, and sponsored MATHCOUNTS local and state competitions for sixth through eighth grades using a spreadsheet I created. I also held the office of Treasurer for the Schenectady chapter of the Professional Engineers Society before it merged into the Capital District Chapter. I learned about the AARP Tax-Aide program through the General Electric ELFUND volunteer organization. I became the ERO and an instructor as some of the older volunteers retired from the program. After I attended a training session, the State Coordinator at the time asked me to help the NY3 Technology Specialist who was having health problems. When his health continued to decline, I was asked to take the position. I am currently in my fifth year of the AARP/TCE program as Counselor.



Have someone you think deserves to be recognized?

Send your nominations to:

Colleen Mooney

cmooneytaxaide@gmail.com

Upcoming Events...

- **Annual District Coordinators Meeting - November 9th-10th**
- **Train the Trainer - November 11th-13th**
- **Local Coordinators Meetings**
- **New Volunteer Training - December**

AARP Tax-Aide Websites

For the Public:

www.aarp.org/taxaide

For Volunteers:

www.aarp.org/tavolunteers

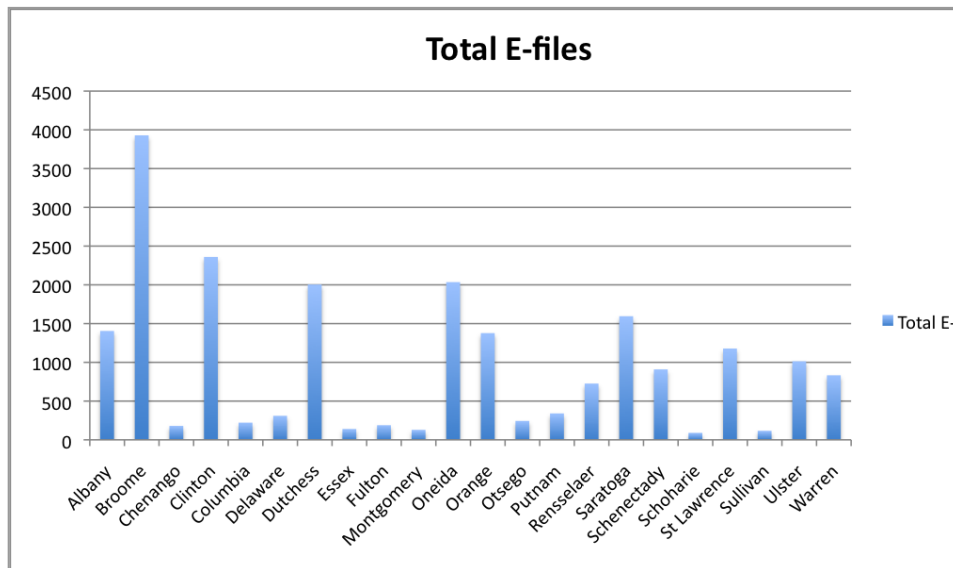
fourth year as Electronic Return Originator, third year as Instructor, and second year as the NY3 Technology Specialist.

**Joe Ciccarino
Training Specialist**

I retired from IBM after 36 years in various technical and management positions. I worked for five years for H&R Block that included teaching classes. Last year, I left H&R Block and joined AARP Tax-Aide because I was more interested in helping people than selling products. While at Block, I learned how many elderly and low income people there were out there that needed assistance with their taxes and AARP Tax-Aide allows me to help them without that help costing them high fees. I have found the overwhelming majority of people we serve to be sincerely grateful for the help we are able to provide. I've also found that providing free assistance is more rewarding than being paid to do the same job.

Did You Know?

For the 2008 tax season, NY3 volunteers filed 21,337 e-file returns which represents 97% of our total returns - the top in the nation! Over 6,200 clients requested direct deposit of their refund. Total Refunds amounted to \$15.4M, which included \$2.6M in EIC payments, money that gets directly put into the economy into YOUR community.



Have an idea for an article?

Please send your submissions to:

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